

GROUPWARE TECHNOLOGIES, INC.

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Provide<sup>®</sup> Enterprise Care Management Software

## Status Neutral User Guide

**Provide® Enterprise**

# Status Neutral User Guide

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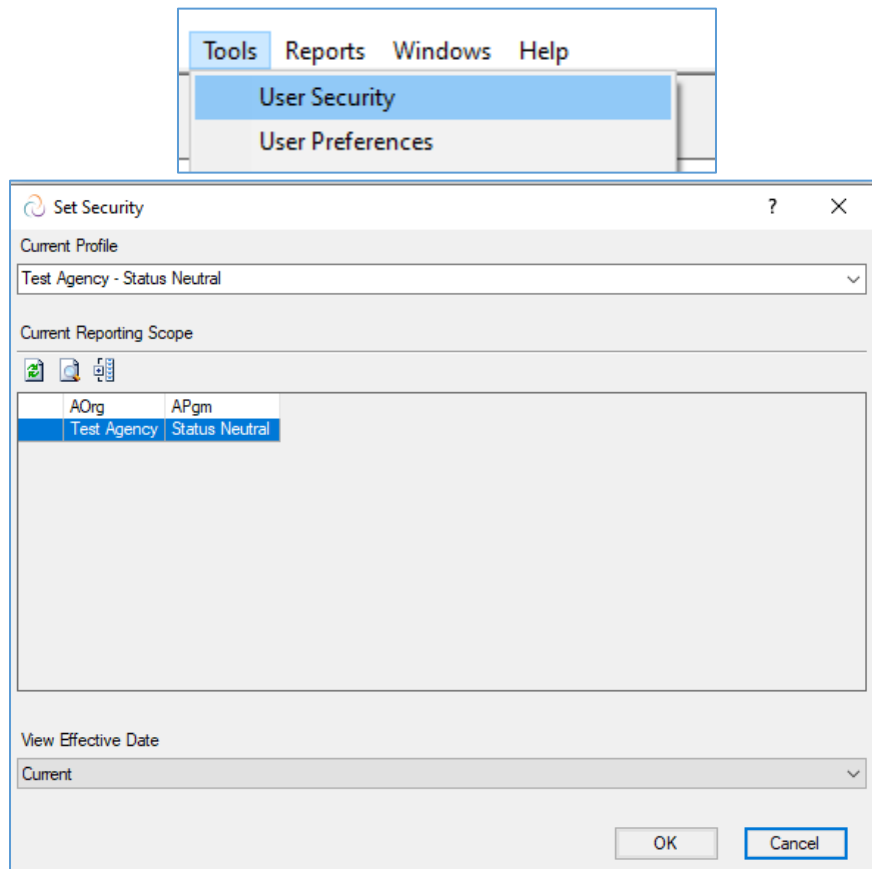
## Introduction

The Virginia Department of Health has chosen to use the Provide Enterprise (PE) system to manage their Ryan White Care and Prevention programs, which includes Status Neutral Service Navigation for individuals who may be at risk or who do not know their HIV Status.

This user guide will walk through the management of these records.

## Security Requirements

In order to enroll and view clients in Status Neutral for your agency, you must have the program Status Neutral set as your current profile. This can be found under Tools > User Security in the Menu Bar.




## Status Neutral Intake

Status Neutral is often the first point of contact for a client seeking assistance. Therefore, the client will need to be registered into Provide Enterprise to begin the intake process. Please refer to the user guide for Client Registration – Completing the Client Profile for more information on the registration process.

Once the client is registered, a base Client Profile is created.

From the Client Profile, click the Create button, and select Status Neutral Intake.

The screenshot shows a software interface for a client profile. At the top, there is a navigation bar with buttons: Close, Save, Create, View, Action, and Print. Below this, the 'Client Profile' section is visible, showing 'Steve St' and 'Test Agency - Status N'. A dropdown menu is open from the 'Create' button, listing several options: Appointment, Status Neutral Intake (highlighted), Status Neutral Encounter, Letter, Progress Log, Required Action, Scan, Service Provided, TB Assessment, Test Result, and Web User Account. To the left of the dropdown, there are tabs for Profile, Demo, and Address. Below these tabs, there are fields for Status, Date of Last Service, Legal Last Name, Legal First Name, Legal Middle Initial, Name Suffix, Preferred Name, Pop-up Alert Message, and SSN.

At any time in the intake process, you may click the  Save button to save your updates.

Main tab:

The screenshot shows the 'Status Neutral Intake' form, Main tab. The title bar indicates 'Status Neutral Intake : Steve Status ()' and 'Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]'. The form has tabs for Main, Demo, Address, Financial, Insurance, and Enrollments. The 'Main' tab is active, showing the following fields:

Assessment Status	
Provide Client ID	10357
Assessment ID	BFA3AB79
File Status	In Progress
Date Received	* 01/08/2022

Applicant Identification	
Legal First Name	* Steve
Legal Middle Initial	
Legal Last Name	* Status
Name Suffix	
Date of Birth	* 10/01/1991
Current Age	30
Current Gender Identity	* Male
Sex Assigned at Birth	* Male

The Main tab, displays the applicant identifying information captured from the registration process.

The **Date Received** defaults to today's date, but can be edited.

Demo tab:

The screenshot shows the 'Demo' tab of the 'Status Neutral Intake' form. The title bar reads 'Status Neutral Intake : Steve Status ()' and 'Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]'. The tabs are 'Main', 'Demo', 'Address', 'Financial', 'Insurance', and 'Enrollments'. The 'Demographic Data' section includes 'Race - Check all that apply' with checkboxes for 'American Indian/Alaska Native', 'Asian' (checked), 'Black or African American', 'Native Hawaiian/Other Pacific Islander', and 'White'. Below this is the 'Asian' section with checkboxes for 'Asian Indian', 'Chinese' (checked), 'Filipino', 'Japanese', 'Korean', 'Vietnamese', and 'Other'. The 'Ethnicity' section has a dropdown menu set to 'Non-Hispanic'.

Complete the required fields containing demographic data for the client.

Address:

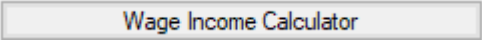
The screenshot shows the 'Address' tab of the 'Status Neutral Intake' form. The title bar reads 'Status Neutral Intake : Steve Status ()' and 'Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]'. The tabs are 'Main', 'Demo', 'Address', 'Financial', 'Insurance', and 'Enrollments'. The 'Residence' section includes 'Housing Type' (dropdown: 'Renting and living in an unsubsidized room or house or apartment'), 'Housing Status' (dropdown: 'Stable/Permanent'), 'Street Address' (text: '123 Sunshine Way'), 'Apt / Lot / Floor' (text: ''), 'State' (dropdown: 'VA'), 'County' (dropdown: 'Accomack'), 'City' (dropdown: 'Accomac'), and 'Zip Code' (text: '53202-'). The 'Telephones' section includes 'Primary Phone' and 'Secondary Phone' (both text: '( ) - - - - -').

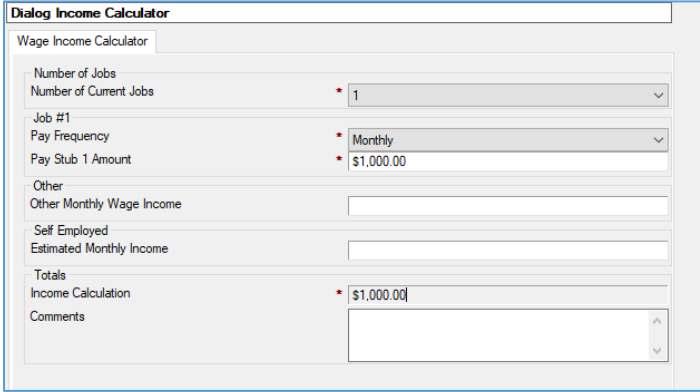
The address tab displays address and phone information captured from the registration process. Check to make sure all required fields are entered correctly.

Financial tab:

The screenshot shows the 'Financial' tab of the 'Status Neutral Intake' form. The title bar reads 'Status Neutral Intake : Steve Status ()' and 'Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]'. The tabs are 'Main', 'Demo', 'Address', 'Financial', 'Insurance', and 'Enrollments'. The 'Financial' section includes 'Total Household Size' (text: ''), 'Current Monthly Household Income' (text: ''), 'Wage Income Calculator' (text: 'Wage Income Calculator'), and 'Gross wages, salaries, tips, etc.' (text: 'Wage Income Calculator').

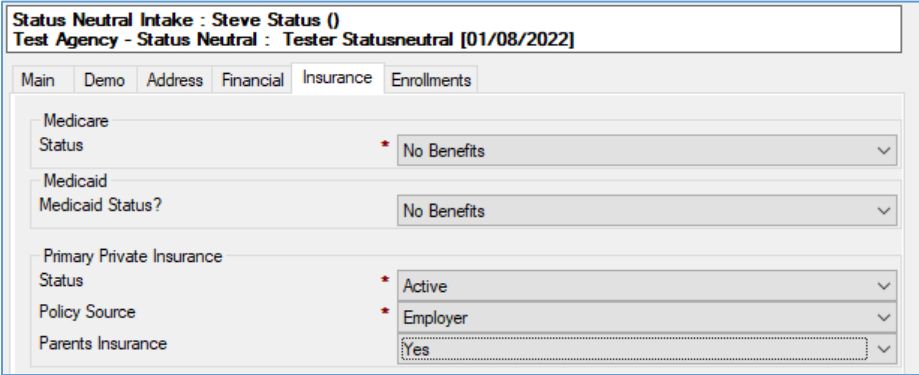
Enter the required financial information.

- **Total Household Size** – enter the number of members in the client’s household.
- **Current Monthly Household Income** – enter the total monthly gross income for the household. You may use the  button to help calculate the total.



The image shows a 'Dialog Income Calculator' window. It contains several input fields: 'Number of Jobs' (set to 1), 'Number of Current Jobs' (set to 1), 'Job #1' (set to 1), 'Pay Frequency' (set to Monthly), 'Pay Stub 1 Amount' (set to \$1,000.00), 'Other Monthly Wage Income' (empty), 'Self Employed' (empty), 'Estimated Monthly Income' (empty), 'Totals' (empty), 'Income Calculation' (set to \$1,000.00), and 'Comments' (empty). There are also buttons for 'Wage Income Calculator' and 'Calculate'.


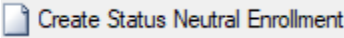
Insurance Tab:



The image shows the 'Insurance' tab of a form. It contains several input fields: 'Medicare Status' (set to No Benefits), 'Medicaid Status?' (set to No Benefits), 'Primary Private Insurance Status' (set to Active), 'Policy Source' (set to Employer), and 'Parents Insurance' (set to Yes). There are also buttons for 'Main', 'Demo', 'Address', 'Financial', 'Enrollments', and 'Save'.

Complete the required fields for the client’s current insurance or benefits coverage.

Enrollment tab:






If you haven’t done so already, click the  button to save the intake record. The  button will be displayed. Click to enroll the client in Status Neutral.

Status Neutral Enrollment : Steve Status ()  
 Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]

Status Neutral Enrollment

Enrollment Status	Enrolled
Referral Source	* Clinical or medical visit
Was psychosocial screening done?	* Yes
Date	01/08/2022
Were needs identified?	* Yes
Was PrEP/nPEP Behavioral screening done?	* Yes
Date	01/08/2022
Were needs identified?	* Yes


Encounters

     Add Encounter


Status	Date	Provider	Contact Type	Deleted?

Complete the required fields:

- **Enrollment Status** – defaults to Pending, change status to Enrolled, Complete, or Denied as appropriate.
- **Referral Source** – make the appropriate selection for how the client was referred to Status Neutral.
- **Was psychosocial screening done?** – Indicate Yes or No. If Yes is selected:
  - **Date** – enter date of psychosocial screening
  - **Were needs identified** – enter Yes or No
- **Was PrEP/nPEP Behavioral screening done?** – Indicate Yes or No. If Yes is selected:
  - **Date** – enter date of PrEP/nPEP Behavioral screening.
  - **Were needs identified?** – enter Yes or No

If you haven't done so already, click the  **Save** button to save the enrollment record.

### ***Document the Encounter***

From the Enrollment record, click the  **Add Encounter** button to document the encounter. You may document other encounters later from the Client Profile by using the Create > Status Neutral Encounter activity.



Status Neutral Encounter : Steve Status ()  
 Test Agency - Data to Care : Tester Statusneutral [01/08/2022]

Summary Referrals

Encounter Status	* In Progress
Encounter Date	* 01/08/2022
Minutes	30
Contact Category	* Status Neutral Navigation
Contact Type	SN-Psychosocial Screening
Funding Source	Other
Contact Method	* In-Person
Date of Next Encounter	* 01/08/2022
Brief Description	* Initial Intake

Full Description

Conducted initial intake and psychosocial eval. Referred to Health Brigade for testing.

Complete the required fields for the encounter.

- **Status** – defaults to In Progress. When you have completed all the documentation for this encounter, change the status to “Complete.”
- **Encounter Date** – enter the date of the encounter.
- **Minutes**- enter the number of minutes for the encounter.
- **Contact Category** – Select the appropriate Contact Type from the list.
- **Contact Method** – Select the appropriate method to indicate how the encounter was conducted.
- **Date of Next Encounter** – Enter the date for your next encounter.
- **Brief Description** – Enter a brief subject of the encounter.
- **Full Description** – Enter any detailed notes about the encounter and next steps.

## Referral Tracking

From the Encounter, you may track any resulting referrals on the Referrals tab. Click the

 **Add Referral** to create a referral.

Referral : Steve Status ()  
 Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]

Referral

Referral Status	* Pending
Referring Person	* Tester Statusneutral
Referral Date	* 01/08/2022
Eligibility Date Expire	02/06/2022
Referred To	* Health Brigade
Referred for Service Type	* HIV Testing
Referred To Assignee	
Referred for Service Description	
Date Check Back	* 02/08/2022
Require Consent	* Yes
Was Client Consent Obtained	* Yes - Signed
Consent Attachment Type	* File
Created By	Tester Statusneutral
File Attachments	

Attach
 Save As
 Launch

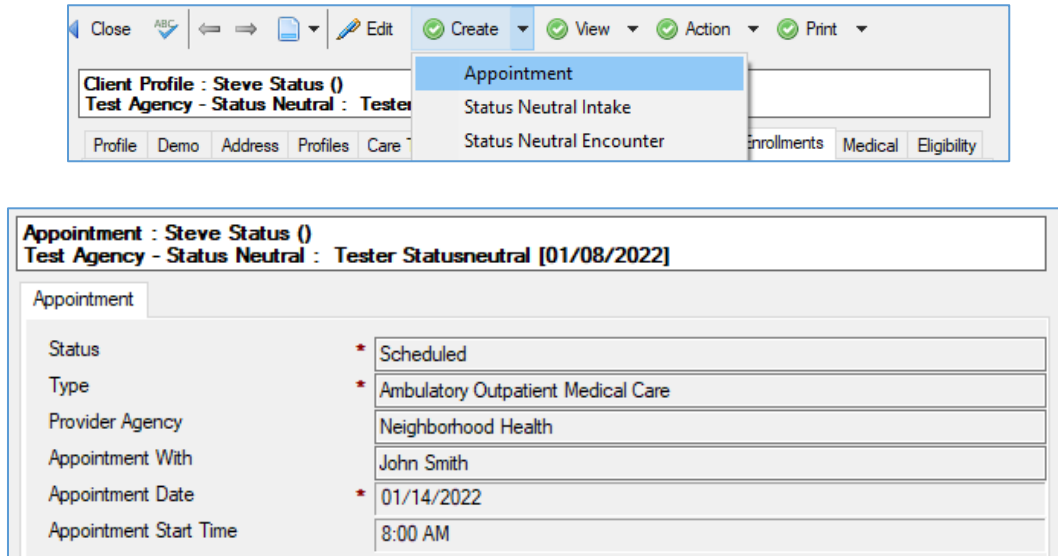
Complete the required fields and attach the appropriate consent.

- **Referral Status** – defaults to Pending
- **Referring Person** – defaults to your user name
- **Referral Date** – defaults to today's date
- **Referred To** – Select the agency receiving the referral
- **Referred for Service Type** – Select the appropriate service for the referral
- **Referred to Assignee** – if applicable, select an individual to receive the referral. Otherwise, leave blank.
- **Referred for Service Description** – brief description of the service to be provided by the receiving organization.
- **Date Check Back** – defaults to one month from date of referral
- **Require Consent** – Defaults to Yes
- **Was Client Consent Obtained** – Yes or No, If Yes attach the signed consent form.

When all the information has been entered, click **Submit** button.

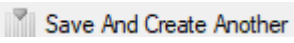

## Appointments

Track appointments made for the client from the Client Profile by clicking Create > Appointment.



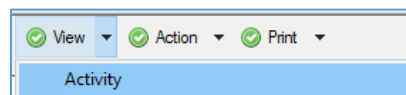
Complete the required fields to track the appointment.

- **Status** – defaults to scheduled.
- **Type** – select the appropriate appointment type
- **Provider Agency** – type or select the service organization where the appointment will take place.
- **Appointment With** – type or select the individual provider
- **Appointment Date** – enter date of appointment
- **Appointment Start Time** – enter time of appointment

When finished you can either select  or  to save the appointment.


## Viewing Activity

To view activity records for a client, click the View > Activity from the Client Profile.



Close		
Form	Deleted	Summary
Appointment		
Appointment		2022/01/14: Scheduled - Ambulatory Outpatient Medical Care at ABC Clinic with John Smith
Referral		
Referral		2022/01/08: Open - HIV Testing to Health Brigade
Scan		
Scan		2022/01/08: Client Consent
Status Neutral Encounter		
Status Neutral Encounter		No Description

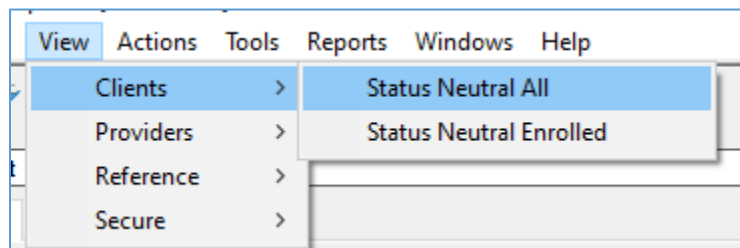
### Editing Appointments


Double-click on the appointment record to open it. Then click the  **Edit** button. You can change the appointment status to Kept, Missed, Rescheduled, or Cancelled. If the appointment was missed, rescheduled or cancelled, enter the appropriate reason.

## Viewing Status Neutral Enrollments

### Status Neutral Views

Provide Enterprise allows you to quickly view your Status Neutral clients. To access these views, navigate to View > Clients.








The “Status Neutral All” view shows all clients with a record in your Status Neutral Program. You can use the  button to categorize the list by any of the columns.

Close

Client ID	Last Name	First Name	MI	Status	Primary Phone	Address 1	City	State	Zip	Historic Client
10357	Status	Steve		Open		123 Sunshine Way	Accomac	VA	53202-	Current
10346	Smurf	Happy		Open		123 Happy Place	Accomac	VA	23212-	Current
10344	Smart	Suzie		Open	(414) 577-7897	123 Smart Street Apt 123	Accomac	VA	23212-	Current
10343	Smart	Suzie		Open	(414) 577-7897	123 Smart Street	Accomac	VA	23212-	Current
10341	Status	Sarah		Open	(804) 444-4444	123 Any Street	Accomac	VA	23212-	Current
10317	Tester	Josie		Open		123 Any St	Accomac	VA	23212-	Current

The “Status Neutral Enrolled” view shows all the clients currently enrolled in Status Neutral.

Close

	Last Name /	First Name /	MI /	Provide ID /	Date Of Birth	Primary Phone
	Smurf	Happy		10346	01/05/1982	
	Status	Sarah		10341	10/01/1982	(804) 444-4444
	Status	Steve		10357	10/01/1991	